California Student Aid Commission

Grant Delivery
System
Modernization
Project (GDSM)

Presented By: California Student Aid Commission





Agenda

- GDSM Project Overview
- GDSM Project Objectives
- GDSM Project Scope
- GDSM Project Key Messages
- GDSM Project Requirements
- Current GDSM Project Status
- GDSM Project Planning Timeline
- GDSM Project Next Steps
- GDSM Contacts FAAB Member List / Email
- Questions?



GDSM Project Overview

The GDSM Project is a collaboration among the California Student Aid Commission (CSAC) and its partners including:

CSAC Partners		
California High Schools (HS)	Private Non-Profit Schools	
California Community Colleges (CCC)	California State University (CSU's)	
University of California (UC's)	Cash for College	
Private For-Profit Schools	Legislative & Executive State Government	
Students and Parents	Numerous statewide organizations and public interest groups.	
Cal-SOAP's	State of California Dept. of Education	

The GDSM Project Solution will provide automation for the support of processing grants, scholarships and other CSAC financial aid programs, and quickly adapt to any changes to programs or any new program that could be implemented in the future.



GDSM Project Objectives

A Modernized GDS System

The objective is to implement a modernized GDS System that:

- Is functionally integrated with all Partner Systems (Segments, Students, FAFSA, etc.)
- Reduce the amount of manual processes;
- Quickly adapt and change to meet legislative, regulatory, and operational requirements;
- Built and documented according to current and future technology trends;
- Provide an open architecture for rapid deployment of new technology needs and enhancements;
- Provides access to aid on current mobile platforms;
- Marketing campaigns, recruitment, targeted population;
- Implements system security and privacy technologies;
- Web Portal for students, parents, institutions to view and make decisions based upon immediate access to data, funding status, financial aid programs available;
- Provides for web entry of all applicable program data and provides for user friendly mass data upload capability.



GDSM Project Scope - Financial Aid Programs

The following Financial Aid Programs must be supported in the GDSM Project Solution

Cal Grant Program	California Dream Act Application
Web Grants and Web Grants for Students	Cash-for-College Program
California Chafee Grant Program - Foster Youth	Middle Class Scholarship Program
California National Guard Education Assistance Program	Cal-Soap Program
California Student Opportunity and Access Program updates	Assumption Program of Loans for Education (APLE)
FAFSA Prior-Prior-Year Updates	Multiple annual changes made pursuant to program or Legislative requirements

Making education beyond high school financially accessible to all Californians.

4



GDSM Project Stakeholders

Key Messages

- Awareness Provide Understanding of the GDSM Project and let Stakeholders know how it will benefit them (What's in it for me?)
- Be aware that people resist change.
- Project Key Focus People, Process, Outcomes, and Facilitate Adoption
- Project Team Provide Summary Status frequently and let stakeholders know about successes and issues
- ✓ Participate and Contribute We need Project Champions!!



GDSM Project Scope Includes

High Level Requirements

- **Application Process** Deliver Services
 - Online Calculator & Estimator
 - Financial Aid Tutorials & Step through Guides
 - Auto Population of Student Data
 - Immediate Award Notification
 - Eligibility Rules and Validation
 - Flexibility Allow Institution to Approve Awards
- On-line/Real Time Support Services
 - Online Chat
 - Help Desk
 - Facebook
 - Twitter
 - Text
 - Snap Chat
 - Social Network Tools

- Disbursement (Just in Time)
 Process
 - Awards disbursed weekly
 - Financial reconciliation tools
 - Streamlined payment rosters
 - Direct funding to recipients
 - Flexibility Allow Institution to Fund Student Award
- Outreach and Marketing
 - Tailor Marketing to Specific Population
 - Social Network Tools
 - Track Effectiveness
 - Tools for Partners



GDSM Project Scope Continued

High Level Requirements

Web Portals

- Student Portal
 - Information
 - Assistance
 - Training
 - Collaboration
 - Chat with Counselors
- Partner Portal
 - Information
 - Student Applications
 - Grants and Scholarships
 - Student Action Items
 - Award Details & Eligible Funds
 - Collaboration Institution Advisors

Reporting/Business Intelligence

- Reporting program, grants, scholarship, population, funding, disbursements, reconciliations, invoicing, etc.
- Dashboards Provide Dynamic Real Time Key Performance Indicators (KPI's) and Metrics Built for each Institution Partner
- Ad Hoc Requests
- Data Mining

Data Exchange – Real time interfaces – sharing information



GDSM Project Scope Continued

High Level Requirements

Events

- Send events to targeted groups
- Cash for College
- Cal-SOAPs
- High School Outreach
- Virtual Campus
- Tracking of Events
- Surveys

Online Programs and Training

Provide online programs and training for mobility issues or remote locations

Awareness

- Improve awareness through outreach and education:
 - Low Income Families
 - Poor School Districts
 - Targeted High Income, High Demand, critical skills, etc.

Early Access

- Training, Education, Assistance prior to High School Senior
- Early Eligibility and Incentives for good GPA's through High School

Stage/Gate Model

Stage 1
Business Analysis

Identify Problem/ Opportunity

Establish Business Case/Need

Ensure Strategic Alignment

Assess Organizational Readiness



We are here
Stage 2
Alternatives Analysis

Assess Existing Business Processes

> Market Research

Develop Mid-level Solution Requirements

Identify Solution Alternatives

COTS/MOTS

CUSTOM

EXISTING

Recommend Solution

Procurement and Staffing Strategy

Project Timeline

Stage 3
Solution
Development
Analysis

Develop Solution Requirements

Develop Solicitation

Project Health Assessment



Stage 4Solution Analysis

Solicitation Release

Select Vendor

Assess Contract Readiness

Assess Project Readiness

Baseline Project

DOF/Legislature APPROVAL



Award Contract and Start Project

Department of Technology Oversight and State Entity Collaboration

Phased Release Beginning Late 2014

GDSM Project High Level Schedule

November 10, 2016

May 2016 <u>– Mar 2017</u> Jan 2017 - Winter 2017 Jan 2015 – July 2016 Assess Existing Business Develop Detailed Identify Problems Processes - C **Solution Requirements** - C Market Research – NS Functional **GDSM** Establish **GDSM** • Develop Mid Level **GDSM** Specifications, **Business Case/** Requirement - NS Technical Specifications Need - C Start Stage 3 Stage 2 Identify Solution • Ensure Strategic Develop Request for Alternatives Stage 1 Alignment - C Proposal (RFP) Recommend Solution Assess Org • Procurement and Staffing Project Health Readiness - C Assessment Project Timeline C = Complete: IP = In Process **RFP** Plan Project **Execute Project Selection** Select Vendor We are here -complete w/HL regs, use cases Plan Risk and Mitigation Manage Risks, Issues, Scope, Changes and **Schedule** Organizational Change Management and Communications

GDSM Project High Level Schedule Cont.

November 10, 2016 Still in Stage 2

Fall 2017 - January 2018 | Jan 2018 - Jan 2019

Jan 2019 – Summer 2020



- Solicitation Release
- Select Vendor Assess Contract Readiness
- **Baseline Project**
- DOF/Legislature Approve

GDSM Project

Development

- Project Management Processes
- Configuration of Business Processes
- Configuration of Technical **Processes**
- Prototype Requirements
- User Sandbox
- Project Sprints
- Test Cases / Scripts

GDSM Project **Implementation** and Launch

- Pilot Phase
- Organization Change Management (OCM)
- Operational **Processes**
- Help Desk Support
- Operation and Maintenance
- Project Assessment

C = Complete; IP = In Process

Execute Pre-Project

Development/Test Project Solution

Launch GDSM

Ready for Launch



Manage Risks, Issues, Scope, Changes and Schedule



Organizational Change Management and Communications



GDSM Project Next Steps

Stakeholder Involvement in the Project:

- In the near future, (November 2016, January, February and March 2017) we will be reach out to key stakeholders for input on the GDSM Project. Including student groups, segments, institutions, financial aid administrators, high school districts and campuses, other student aid partners and interested organizations.
- The functions of the GDSM Solution must be identified and finalized during Stages 2 and 3. Stage 3 will involve sending out an RFP to select a Systems Integrator/Solution Provider to build our modernized system, based on the requirements and functionality identified and finalized in Stages 2 and 3.
- Target completion of Stage 2 by March 30, 2017, and no later than June 30, 2017, the end of this fiscal year.
- Target completion of Stage 3 by October 31, 2017.

GDSM Project Organizational Change Management (OCM) and Stakeholder Communications

- Inform stakeholders
- Communicate project timeline, intended audience, and system to be implemented
- Inform stakeholders about where they can obtain program information
- Inform stakeholders how they will work with the new changes
- Communicate system and business process changes
- Inform stakeholders of training to be provided
- Inform stakeholders about the upcoming implementation
- Communicate all rollout activities
- Inform stakeholders of training timeline and enrollment process

- Inform stakeholders of key project milestones
- Communicate issues and resolutions
- Inform stakeholders of ongoing support processes

Change Commitment Curve

Understanding

- Awareness
- Explain the goals, purpose, and rationale for the project
- Explain the benefits

- Explain the impact to their role
- Understand the need for change
- Use change network to communicate key change measures

Acceptance

- Explain changes to the business processes
- Explain how it will be implemented
- Explain how they will use it to do their jobs

Commitment

- · Explainthe benefits
- Use the new system to do their job
- Participation in support activities and followup



GDSM Financial Aid Advisory Board (FAAB) Members

Association of Independent California Colleges and Universities (AICCU)

Segment Representative

Veronica Villalobos Cruz - <u>veronica@aiccu.edu</u> Project Coordinator

Campus Representative

Norman Caito - caiton@usfca.edu
Director of Financial Aid
University of San Francisco

California Association of Private Postsecondary Schools (CAPPS)

Segment Representative

David Allen - <u>dallen@mticollege.edu</u> Chief Financial Officer MTI College

California Association of Student Financial Aid Administrators (CASFAA)

Segment Representative

Dustin Smith - dasmith4@usfca.edu Vice President of State Issues



GDSM Financial Aid Advisory Board (FAAB) Members **Continued**

California Community College Student Financial Aid Association (CCCSFAA)		
Segment Representative	Dr. Linda Williams - <u>lwilliams@sierracollege.edu</u> President	
California Community Colleges (CCC)		
Segment Representative	Bryan Dickason - <u>bdickason@cccco.edu</u> CCCCO Specialist Student Planning and Development	
Campus Representative	Karen Micalizio - <u>micalizioka@butte.edu</u> Dean of Financial Aid & Special Programs Butte College	
California State University (CSU)		
Segment Representative	Dean Kulju - <u>dkulju@calstate.edu</u> Director of Student Financial Aid Services Programs	
Campus Representative	Noelia Gonzalez - <u>ngonzalez4@csustan.edu</u> Director of Admissions and Financial Aid California State University, Stanislaus	
University of California (UC)		
Segment Representative	Christopher W. Carter - <u>chris.carter@ucop.edu</u> Director of Student Financial Support	
Campus Representative	Patrick Register - <mark>ipregis@ucsc.edu</mark> Director of Financial Aid and Scholarship Office University of California, Santa Cruz	



GDSM Financial Aid Advisory Board (FAAB) Members Continued

California Department of Education (CDE)		
Segment Representative	LeAnn Fong-Batkin, Ed.D <u>LFongBatkin@cde.ca.gov</u> Education Programs Consultant College Preparation and Postsecondary Programs Office	
Fresno Unified School District		
High School Counselor	Christina Espinosa - <u>christina.espinosa@fresnounified.org</u> Director of Guidance and Counseling Fresno Unified School District	
Los Angeles Unified School District		
High School Counselor	Gilbert N. Viveros - gviveros@lausd.net College and Middle School Counselor Los Angeles Unified School District	
Local School District		
High School Counselor	VACANT	
California Student Aid Commission (CSAC)		
Student Representative	Devon Graves - <u>chairgraves@gmail.com</u> Commissioner California Student Aid Commission	



GDSM Project Email Contact

Reach the GDSM Project at:

GDSMProject@csac.ca.gov



Questions?





Thank You